

A Reflexive Inquiry into the Process of Discovery in Organizational Scholarship

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Abstract. This paper presents the findings of a reflexive inquiry into the process of discovery in organizational scholarship. The two foci of our methodology are intentionality analysis (of the content of the discovery) and interiority analysis (of the personal development of the inquirer); the inquiry presents an unfolding mutually self-mediated act of understanding that emerges when scholars abide by four principles implicit in the structure of cognition. The product of this inquiry is an insight into the grounding of methodology in cognitive principles. Organizational scholarship requires our attending to data, understanding emerging patterns, finding plausible reasons, and deciding on a position; these four cognitive operations are dynamically recursively imbricated, and the cognitive structure is oriented to the good to the extent that our mutual self-mediation is authentic. The notions presented in our inquiry emerge from our personal engagement with the thought of Bernard Lonergan (1904-1984), a Jesuit theologian in search of a methodology adequate to the turn from substance to subject in his field. Our inquiry is a contribution to the reflexive turn that Ann Langley calls for in organizational scholarship. The insight that emerges from this inquiry has methodological relevance in the classroom, in the field, and in the academy.

Keywords: Dynamic Cognitive Structure, Reflexive Methodology, Intentionality Analysis, Interiority Analysis, Authentic Mutual Self-mediation

1 Introduction

This is a paper in reflexive mode approaching the conceptual leap in qualitative research with explicit reference to an important review of organizational scholarship (Klag & Langley, 2013), and to the work of Bernard Lonergan (1904-1984), a Jesuit theologian and philosopher, as it pertains to organizational scholarship. It is the fruit of a monthly seminar over the last three years in which the authors discussed Lonergan scholars the insights of Lonergan and other philosophers relevant for our teaching practice at undergraduate and post-graduate level in ethics, strategic management, and sustainability assessment and in our research practice in the field of organization and learning.

Before addressing the question of methodology (how we come to know), we propose a journey of discovery of what it is we are doing when we come to know (B. Lonergan, 1992). Lonergan claims that becoming aware of our own awareness is what constitutes us as self-conscious inquirers; capable of knowing and not knowing, of deliberation and serendipity, of belonging and becoming, of engagement and detachment,

in the words of our organizational scholars (Klag & Langley, 2013). Put this way, awareness of awareness is a presupposition of conceptual leaps in organizational scholarship and more generally of insight, tout court.

What drew us to this inquiry into methodology is serendipity. In a previous paper, we had argued that meaningful responses to challenging decision-making situations presuppose that the experiential, practical, social, and historical tensions of the situation be integrated in the decision-maker as subject (J. Hegarty, and Maubrey R., 2022). And then in a seminar this month on methodology in inductive research given by a leading organizational scholar (Kevin Coverley, April 2023), we discovered the Klag and Langley paper on the conceptual leap cited above, and this triggered our insight into the grounding of methodology in cognition, a seeing that is articulated in this paper.

In the seminar, Coverley overviewed the similarities and differences in approach of three leading organizational scholars (Gehman et al., 2018). Coverley pointed out that he, Langley, Eisenhardt, and Gioia all agree that theory must be grounded in data, and in reasoning, be it inductive (Gioia and Coverley), deductive (Eisenhardt) or abductive (Langley). And they all agree that what constitutes grounding a theory in data and reason depends on the purpose of the research, hence the need for theory-method fit.

This paper responds to Klag and Langley's call for greater openness and legitimacy for reflexive accounts (Alvesson & Skoldberg, 2017) as well as further research into the process of discovery in qualitative research. We understand reflexive accounts as following (even if only loosely) a quadri-hermeneutics with four levels of interpretation: empirical material (à la grounded theory), interpretation (à la hermeneutics), critical interpretation (à la Frankfurt school), and self-critical and linguistic reflection (Alvesson & Skoldberg, 2017).

Hereafter, the paper is organized as follows. Section 2 presents the relevant literature in organizational scholarship and Lonergan studies, Section 3 presents our experience in developing a theory of organizational learning before and after discovering Lonergan's work, Section 4 presents our findings, and Section 5 concludes and indicates avenues for future research.

2 Literature – On Mutual Mediation of Cognition and Methodology

In this section, we bring together literature from Organizational Scholarship and Lonergan Studies on the notions of cognition, mediation, and methodology. While the terms may be different, these discourses from very different disciplines share a broad understanding of what knowledge is.

The authors we cite refer explicitly or implicitly to knowledge in its personal dimension (Polanyi, 2015), in its social dimension (Gadamer, Weinsheimer, & Marshall, 2004), in its historical and political dimension (Voegelin, 2000), in its purpose and intentionality (Anscombe, 2000), and in its interiority (Augustine, 1876).

Both Lonergan and Langley go beyond Gettier's often-cited questioning of the character of knowledge as justified true belief (Gettier, 1963); they address the important and mysterious question of the process of discovery and the act of understanding that precedes every reflective act of assent (Newman, 1992).

2.1 Dynamic Cognitive Structure - The Act of Understanding

Lonergan's work on cognitive structure is presented in his 875-page "Insight - A Study of Human Understanding" (B. Lonergan, 1992) and summarily in a 12-page article (B. Lonergan, 1967). The four recursively imbricated operations of cognitional structure are attending, understanding, reasoning, and deciding. The model is illustrated in Table 1 below.

Insert Table 1 here

Lonergan explicates the dynamically recursively imbricated cognitive operations successively using examples from mathematics, empirical science, common sense, and human development and he presents the book "Insight" as a tool to enhance one's understanding of understanding, it is a journey not to discover the known, or the knowable, but rather the knower. At some point along this journey, the inquirer experiences what Lonergan calls the existential moment.

2.2 Methodology – Intentional Analysis and Interiority Analysis

Lonergan's work on methodology is presented in his 456-page magnum opus "Method in Theology" (B. Lonergan, 2017). Lonergan initially called his method 'General Empirical Method' (GEM), pointing to its extension of empirical method to include the data of consciousness but later he calls it 'Transcendental Method' (TM) recognizing affinities with Kant.

A Lonergan scholar has proposed an insightful way to characterize Lonergan's methodology (Friel). Friel notes that cognitive operations are both intentional (they take an object) and conscious (they do not happen unawares). These two poles of cognition yield the two foci of methodology (GEM and TM); GEM analyzes interiority and TM analyzes intentionality.

2.3 Mediation, Mutual Mediation, Self-Mediation, and Mutual Self-Mediation

Lonergan's work on mediation is presented in volume 6 of his 23-volume collected works (B. J. Lonergan, Crowe, & Doran, 1988). The title of this essay is clearly chosen for a theological audience and its final part is a reflexive inquiry by Lonergan into prayer but our interest here is in the insightful generalization of the Aristotelian notion of the immediate and the mediated. Lonergan defines mediation in a completely general way and points out that the significance of this definition arises in the patterning that the notion of mediation itself can accept. He goes on to derive the notions of mutual mediation, self-mediation, and mutual self-mediation. The four definitions are given below:

Mediation: "If we can say of any factor, quality, property, feature, aspect that has on the one hand, a source, origin, ground, basis, and on the other hand, consequences, effects, derivatives, a field of influence, of radiation, of expansion, or that has an

expression, manifestation, revelation, outcome – we can say that this factor, quality, property, feature, or aspect is immediate in the source, origin, ground, or basis and on the other hand is mediated in the consequences, effects, derivatives, outcome, in the field of influence, radiation, expansion, in the expression, manifestation, revelation.”

Mutual Mediation: “the mediation of the parts in the functional whole”; a functional whole is constituted by mutually mediating parts for example empirical science is a compound of two principles of immediacy it is science because of its intellectual element, it is empirical because of the data.

Self-Mediation: “we can think of self-mediation as a whole that has consequences that change the whole”. Lonergan describes the growth of an organism as a self-mediation, there is something more to the organism than mutual mediation. There is the structuring that regards both functioning at the moment *and* future functioning. Similarly, he applies the notion of self-mediation to the species (which mediates itself through the individuals).

A second form of self-mediation is consciousness, a displacement inwards. “The subject is constituted as present to itself by the act of intending. This presence of the subject to himself is not the result of any act of introspection, some act of reflection. The subject has to be present to himself for there to be anything within consciousness on which one could reflect, into which one could introspect.”

A third form of self-mediation is self-consciousness. “Human development is the mediation of autonomy, this process reaches its climax, its critical and decisive phase, when one finds out for oneself what one can make of oneself, when one decides for oneself what one is to be, when one lives in fidelity to one’s self-discovery and decision. It is the existential moment that the drifter never confronts.”

“The disposing of oneself occurs in community. Human community, materially, is an aggregate of human beings. But formally, it is an intentional reality, and that intentional reality is not merely a matter of knowing but also of deciding, of commitment. The community is constituted by its common sense, its common meaning, its common commitment, its common apprehension of what the community is and what being a member of the community implies. As a community mediates itself in its history, so the individual mediates oneself, manifests oneself objectively to others and to oneself, by one’s living”.

Mutual Self-Mediation: The fourth and final form of mediation is mutual self-mediation. “Just as there is a self-mediation towards autonomy and a mutual mediation illustrated by the organism or the functional whole that is not a machine, so there is a mutual self-mediation. We are open to influence from others and others are open to influence from us. There are matrices of personal relations in industry and commerce, in the professions, in local, national, and international politics.”

Lonergan goes on to apply the notion of mutual self-mediation to the classroom. “Mutual self-mediation is also the imponderable in education that does not show up in charts and statistics, that lies in the immediate interpersonal situation which vanishes when communication becomes indirect through books, through television programs, through teaching by mail”.

3 A reflexive inquiry into mutual self-mediation in situated learning and organizational scholarship contexts

In this section, we reflect reflexively on our experience in mutual self-mediation in a situated learning teaching project in Paris and in an organizational learning research project in Dublin. The first project was presented as a case in a short paper at IRMBAM 2022 (J. Hegarty, and Maubrey R., 2022), the second project concerns reflexive reflection on the case study in our PhD thesis (G. J. Hegarty, 2013). We are using the term ‘reflection’ in its ordinary sense and ‘reflexive’ in the sense of ‘reflexive methodology’ (Alvesson & Sköldbberg, 2017).

3.1 A Situated Learning Teaching Project in Paris

Shortly after completing my PhD thesis on organizational learning, I came upon Lave and Wenger’s work on situated learning and immediately recognized its complementarity to the work I had been doing during and since my thesis on developing a theory of practice-based organizational learning.

My heroes at the time were development psychologists Piaget (Piaget, 1950) and Vygotsky (Lave & Wenger, 2012), so I was comfortable with Lave and Wenger’s idea of “learning as becoming”. It was their idea of “learning as belonging to a community” that got me reading Gadamer again and understanding what he meant by understanding as a triad “coming to an understanding with another person about the meaning of something”.

I immediately tried to integrate the notion of a community of practice into my teaching of strategic management, trying to move Le Moigne’s open systems model of the organization (Le Moigne, 1990) towards Elinor Ostrom’s socio-ecological-systems (Ostrom, 2007); this work is recounted in a Journal of Decision Systems paper (J. Hegarty & Maubrey, 2020). The resulting ‘bricolage’ was moving me closer to a stakeholder and community of practice view of accounting and I started teaching sustainability assessment. Dealing with incommensurability was still a problem as I did not have a response to the question of commitment.

At around this time, in a wide-ranging discussion about what to do in a concrete decision-making situation I faced, the name of Bernard Lonergan came up and his method of discernment. It was during the covid pandemic, and I had time to read Lonergan’s “Insight”. After the summer holidays I discussed my reading with a colleague who happened to be familiar with Lonergan from his undergraduate studies at Anselm Abbey where there is a Lonergan institute for the construction of the good. This led to our monthly seminar with Dunstan Robidoux and Roland Krismer, both teachers and Lonergan scholars.

Lonergan’s respect for Hegel, encouraged me to investigate the Pittsburg Hegelians (Sellars (Sellars, 1956), Rorty (Rorty, 2009), Brandom (Brandom, 2008, 2019), and McDowell (McDowell, 1996)) and via these I discovered other Locke lecturers, Philipp Petit (Pettit, 2002) and Peter Railton (Railton, 1984). Then Lonergan’s sympathy with Aristotle and Aquinas led me back to Anscombe’s “intention” (Anscombe, 2000) and on to discover Charles Taylor’s “ethics of authenticity” and “sources of the self” (Taylor, 1992a, 1992b).

All this went into different iterations of a new course on sustainability assessment that was the subject of our online presentation at IRMBAM 2022 (J. Hegarty, and Maubrey R., 2022). In this work we concluded that situated learning calls for three practices on the part of the teacher:

Practice N° 1: Characterizing situations as the tension between a particular challenge and the organization and situating learners in this tension.

Practice N° 2: Providing students with expressive representation formalisms and showing them how to embody the underlying principles.

Practice N° 3: Encouraging students to make explicit their presuppositions about organizations and institutions, clarifying the responsibility of the individual and the community.

3.2 An Organizational Learning Research Project in Dublin

Insofar as the explicit characterization of our best practices in teaching is an instantiation of practice-based organizational learning in the school where we teach, it answers a question that threw me at the time of doing my thesis (J. Hegarty, Brézillon, & Adam, 2013).

The question came at a presentation I made at DSS 2013 in Greece (J. Hegarty et al., 2013), and it came from a founding member of the conference, who had recently retired as president of one of Paris' most prestigious universities: "Do organizations learn?" Later that day, my questioner confided that he didn't believe that organizations learn, and he suggested that I read Jim March's work to get a wider view (March & Olsen, 2004).

Ten years on, I would now characterize authentic organizational learning as a common commitment, by the community that constitutes the organization, to be attentive, intelligent, reasonable, and responsible in all its activities; meaning, doing, belonging, and becoming what the organization as a community decides it wants to be. To the extent that the organization's members are faithful to their common commitment, the organization leverages lessons learned in the realization of its purpose and is oriented to the construction of the good.

4 Findings

If reading this paper triggers an insight in our reader into the grounding of methodology in cognition, then the reader has acquired the tools for pursuing mutual self-mediation with others.

If our reader is a researcher, then the mutual self-mediation will be with other researchers in their own research community or with members of other research communities in the academy.

If our reader is a teacher, then the self-mediation will be with other teachers in the community of teaching practice or with learners in the classroom.

If our reader is a practitioner of business and management then the mutual self-mediation will be with other practitioners of the community of business and management practice.

5 Conclusions and future work

The inquiry presented here suggests possible contributions in the classroom (making understanding central, again), in the field of business and management (making trust central, again), and in the world of ideas (making the idea of mediation central, again).

We claim that the more authentic our engagement with the ideas presented here, the closer we move to the existential moment as teachers and learners, and as researchers and practitioners. And in so doing we orient our endeavors to the construction of the good.

If this paper is a manifesto, then the future work is to spread the good news!

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Cognitive Operation:	Act of:	Principle:	Comment:
Attending	Attention	Be attentive	Include all data not just sense data
Understanding	Intelligence	Be intelligent	Intelligence is seeing the pattern, pre-conceptual
Reasoning	Judgment	Be reasonable	Logic, the "whys", reasons are prior to desires (Scanlon, 2000)
Deciding	Commitment	Be responsible	Decision is a commitment manifested over time through acts

Table 1. The four dynamically recursively imbricated operations of cognitional structure (B. Lonergan, 1967, 1992)